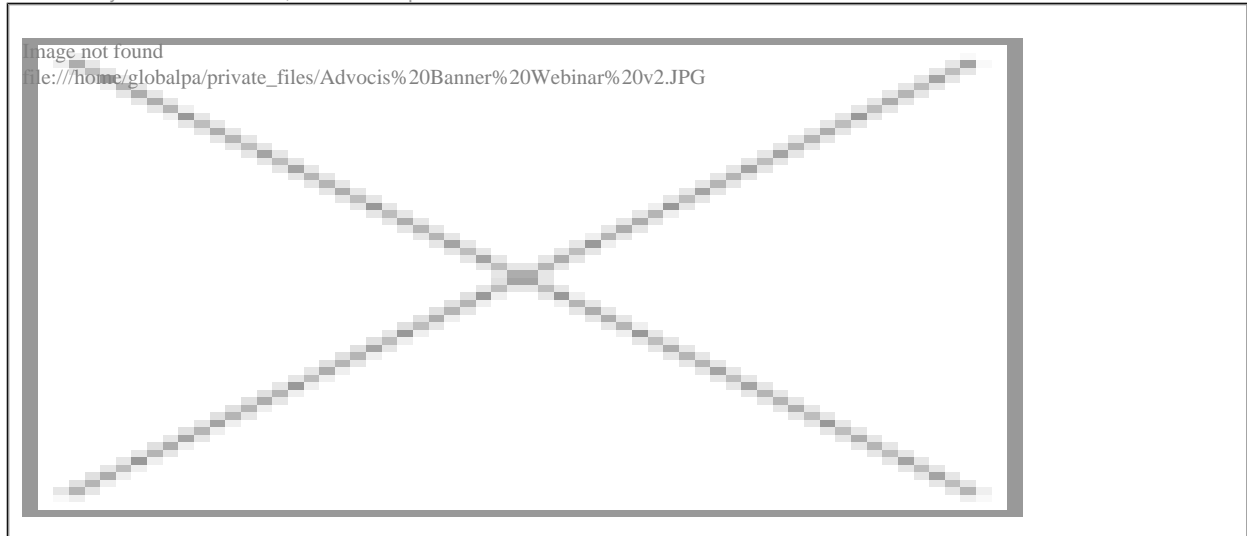




GLOBAL PACIFIC  
FINANCIAL SERVICES LTD.

## Last Chance to Register For: Advocis Thompson Okanagan: Practice Development Series Module 9A - Practice Management

Submitted by Victoria on June 2, 2021 - 12:42pm



### Practice Development Series

Register Now



Please note that registration for this event will close on June 3, 2021, at 1:00 P.M. (PDT). Join us on **Tuesday, June 08, 2021, at 8:30 A.M. (PDT)** for Module 9A of the Practice Development series.

The Advocis BC Chapters have collaborated to offer the Advocis Practice Development series, focusing on skills and knowledge that newer advisors need to be successful. The modules are delivered in two parts by experienced advisors who will facilitate the workshops and mentor the participants.

**This Webinar is Complimentary to both Members and Non-members**

## Module Nine: Practice Management

As your business grows it becomes necessary to look at how the business is being managed. Few advisors are skilled at effectively managing their time given all the administrative and compliance tasks that are a reality in this business. In this module, you will learn:

- The importance of time management
- How to utilize resources and support to improve efficiencies
- How to create a strong set of procedures
- How the office set-up will impact client meetings
- Ongoing licensing requirements.

\*Module Nine has been approved by The Institute for **3.0 CE (incl. 1 Ethics credit)** credits.





































# Development Series Includes:

Source URL: <https://www.gpts.ca/bulletins/advocis/2021-06-02/last-chance-register-advocis-thompson-okanagan-practice-development-series-module-9a-practice-manag>

- **Module 1A:** Business Planning: September 15, 2020
- **Module 1B:** Business Planning/Mentor Input: September 22, 2020
- **Module 2A:** Marketing: October 6, 2020
- **Module 2B:** Marketing/Mentor Input: October 20, 2020
- **Module 3A:** Prospecting: November 17, 2020
- **Module 3B:** Prospecting/Mentor Input: November 24, 2020

## Modules 4-6: Hosted by Advocis Greater Vancouver:

- **Module 4A:** Preparation: January 12, 2021
- **Module 4B:** Preparation/Mentor Input: January 19, 2021
- **Module 5A:** Client Engagement: February 9, 2021
- **Module 5B:** Client Engagement/Mentor Input: February 23, 2021
- **Module 6A:** Analysis: March 9, 2021
- **Module 6B:** Analysis /Mentor Input: March 16, 2021

## Modules 7-9: Hosted by Advocis Greater Kootenay:

- **Module 7A:** Advice Delivery: April 13, 2021
- **Module 7B:** Advice Delivery/Mentor Input: April 20, 2021
- **Module 8A:** Business Management: May 11, 2021
- **Module 8B:** Business Management/Mentor Input: May 18, 2021
- **Module 9A: Practice Management: June 8, 2021**
- **Module 9B:** Practice Management/Mentor Input: June 15, 2021

## Modules 10-12: Hosted by Advocis Greater Thompson Okanagan:

- **Module 10A:** Marketing Your Practice: September 14, 2021